

MyTax.DC.gov User Guide: How to Request and Approve Third Party Access

You can request to manage another taxpayer's account with his or her permission. Note: Both parties must have a MyTax.DC.gov account (visit "How to Sign up for an Account" for more information).



Can't find what you're looking for? Enter keywords here to filter.



Business

- I want to...
- > Register a New Business - Form FR-500
 - > Register a Special Event - Form FR-500B
 - > Request a Certificate of Clean Hands



Individual

- I want to...
- > Check the Status of My Refund
 - > Learn More About DC Freefile/Fillable Forms
 - > Respond to Verification Letter
 - > View Tax Forms



Real Property

- I want to...
- > Make a Real Property Payment
 - > Search Real Property by Address or SSL
 - > View More Options



Clean Hands

- I want to...
- > Request a Certificate of Clean Hands
 - > Validate a Certificate of Clean Hands
 - > Learn More About Certificate of Clean Hands



Forms

- I want to...
- > Submit an Extension
 - > View/Retrieve Current Year Tax Forms
 - > View/Retrieve Prior Year Tax Forms
 - > View MeF Information



Quick Links

- I want to...
- > Submit a Customer Service Survey
 - > View FAQs
 - > View Tutorials
 - > Contact OTR



Quick Payments

- I want to...
- > Pay with Credit/Debit Card



Resources

- I want to...
- > Go to OTR Homepage



Submissions

- I want to...
- > Retrieve a Saved Submission or Previously Filed Return
 - > Submit Requested Documentation



Tax Law and Guidance

- I want to...
- > View Private Letter Rulings
 - > View DC Tax Code
 - > View Tax Guidance Issued by OTR
 - > View Notices



Taxpayer Advocate

- I want to...
- > View Taxpayer Bill of Rights
 - > Request Assistance
 - > En Español



More...

- I want to...
- > File Form FR-329 - Consumer Use Tax Return
 - > Request Government Exemption
 - > Request Residential Parking Exemption
 - > Search for Certificate/License Exemptions

MyTax.DC.gov User Guide: How to Request Third Party Access to a Taxpayer's Account

TEST

00001-32882
1101 4TH ST SW STE 5W
WASHINGTON DC 20024-4473

Welcome, TEST TEST

You last logged in on Tuesday, Sep 29, 2020 11:32:09 AM

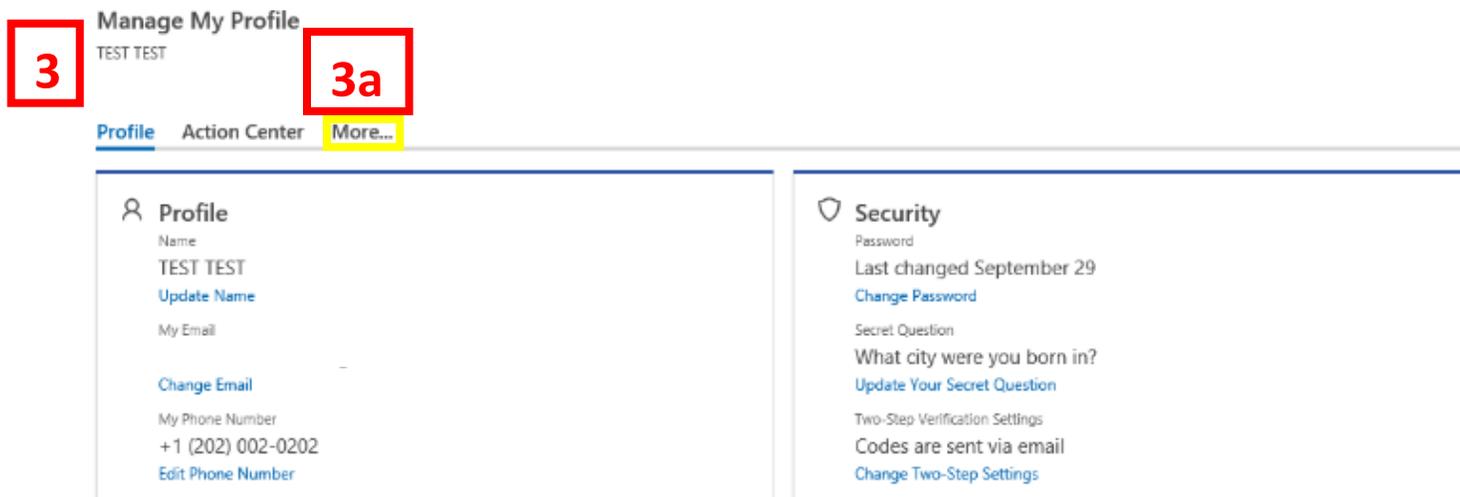
[Manage My Profile](#)

2

[Action Center](#) [Settings](#) [More...](#)

✔ There are no actions requiring your attention.

1. From the [MyTax.DC.gov](https://www.mytax.dc.gov) homepage, log in using your **Username** and **Password**.
2. In the user profile, locate and **click** the “**Manage My Profile**” link in the upper right corner.



The screenshot shows the 'Manage My Profile' page for a user named 'TEST TEST'. A red box with the number '3' is placed over the page title. Below the title are three tabs: 'Profile', 'Action Center', and 'More...'. The 'More...' tab is highlighted in yellow and has a red box with '3a' over it. The page content is divided into two columns. The left column is titled 'Profile' and contains fields for Name (TEST TEST), My Email, and My Phone Number (+1 (202) 002-0202). The right column is titled 'Security' and contains fields for Password (Last changed September 29), Secret Question (What city were you born in?), and Two-Step Verification Settings (Codes are sent via email).

3. You will be navigated to the **Manage My Profile** page
 - a. Locate and **click** the **More** tab.

4 Manage My Profile
TEST TEST

Profile Action Center [More...](#)

🔍 What are you looking for?

4a

 **Access**
Manage access of accounts I have access to.

- > Manage My Access
- > Manage Third Party Access
- > **Request Third Party Access**
- > Delete My Profile

 **Web Logons**
Manage web logons.

- > Add an Additional Logon
- > Manage Additional Logons

 **Payment Channels**
Manage my bank accounts used to make payments on MyTax.DC.gov.

- > Manage Payment Channels

4. You will see your “Access” section.
 - a. Locate and click the **Request Third Party Access** hyperlink.

Third Party Access Request

Instructions

Account Information

Instructions

5

Third party access allows you to view accounts associated with another business, as well as file and pay on their accounts. This process requires you to request third party access to the other business. The requesting business needs to approve or deny your request.

During this process, the business who you are requesting access to will receive an email notification of your request. You will receive an email once the business has approved or denied your request.

5a

Cancel

< Previous

Next >

5. An **Instructions** page will display. **Note:** You will need to know what type of account the taxpayer signed up with via Mytax.DC.gov in order to make a proper selection.
 - a. Click **Next**.

6 **Third Party Access Request**

Instructions Account Information

6a **Account Information**

Account Type
Sales & Use Tax

Account ID
350-000055010

6b Cancel **6c** < Previous Submit

6. On the **Third Party Access Request** page, use the drop-down menu to select the **Account Type** (e.g. Sales & Use Tax, Withholding Wage Tax) that you would like to gain access to.
 - a. In **Account Type** field, select the type of account the taxpayer signed up with via MyTax.DC.gov in order to request access to their account.
 - b. In the **Account ID** field, enter the **Account ID** associated with the **Account Type**. **Note:** Based on the Account Type selected, the system will request an Account ID, FEIN, SSN or ITIN.
 - c. Click **Submit**.

7

Confirmation



Click 'OK' to submit, or 'Cancel' to change this request.

Cancel

OK

7. A **Confirmation** pop-up will appear. Click **Ok**.

Confirmation

Your request has been successfully submitted. Please print a copy of this page for your records.
Your request confirmation number is **0-000-049-894**. Please retain your confirmation number for future reference.
Request Type: Third Party Access Request
Submitted Date: 29-Sep-2020 12:23:25 PM

Contact Us:
(202) 759-1946
e-services.otr@dc.gov

8

Printable View

OK

Feedback

How satisfied were you with using the MyTax application to complete your tax matter?



Comments

9

Submit Feedback

- 8. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise click **Ok**.
- 9. A section to provide **Feedback** will also appear. Please take a moment to let us know how satisfied you were using the MyTax application to request **Third Party Access**. You will also be able to share any comments or concerns in the space provided. Once finished, click “**Submit Feedback**”.

Note: The Taxpayer will receive your third party request via his or her MyTax.DC.Gov account.

Logon
TEST TEST

Welcome, TEST TEST
You last logged in on Tuesday, Sep 29, 2020 11:32:09 AM
[Manage My Profile](#)
[Accountant Center](#)

Who do you want to work with?

Filter

10

BUSINESS TEST

00000-91110
1001 4TH ST SW WASHINGTON DC 20024-4517

TEST

00001-32882
1101 4TH ST SW STE 5W WASHINGTON DC 20024-4473

10. If the taxpayer approves your third-party request, when you log into your MyTax.DC.gov profile, you will have access to your accounts and the client's accounts. You will see a list of all accessed accounts.

MyTax.DC.gov User Guide: How to Approve Third Party Access



1

Username

Password

Log In

Forgot username or password?

New user?

Sign-up for MyTax.DC.gov

Can't find what you're looking for? Enter keywords here to filter.



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- > Submit Requested Documentation
- > Submit VDA



Taxpayer Advocate

I want to...

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More...

I want to...

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- > Request Government Exemption
- > Request Residential Parking Exemption
- > Search for Certificate/License Exemptions

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517



Welcome, John Doe

You last logged in on Thursday, Sep 24, 2020 1:07:05 PM

[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) [More...](#)

Filter

Alcoholic Beverage

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517
[Action Center Items](#)

Account

430-000120328

Balance

\$0.00

- > [Make a Payment](#)
- > [Returns](#)
- > [View Other Options...](#)

Sales & Use Tax

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517
[Action Center Items](#)

Account

350-000055010

Balance

\$0.00

- > [Make a Payment](#)
- > [Returns](#)
- > [View Other Options...](#)

Special Event

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517

Account

360-000071024

Balance

\$0.00

- > [Returns](#)
- > [View Other Options...](#)

Sports Wagering Tax

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517
[Action Center Items](#)

Account

426-000140644

Balance

\$0.00

- > [Make a Payment](#)
- > [Returns](#)
- > [View Other Options...](#)

Street Vendor

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517
[Action Center Items](#)

Account

353-000075242

Balance

\$0.00

- > [Make a Payment](#)
- > [Returns](#)
- > [View Other Options...](#)

1. From the MyTax.DC.gov homepage, log in using your **Username** and **Password**.
2. In the user profile, Click the **Action Center** tab.

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

3

Welcome, John Doe

You last logged in on Thursday, Sep 24, 2020 1:07:05 PM

[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) ²⁸ [Settings](#) [More...](#)

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

You have an unread message ×

Messages sent to you may contain important information about your accounts.

[View Messages](#)

NAICS code is missing ×

A NAICS code needs to be added.

[Add a NAICS Code](#)

You have a third party access request pending ×

A response to this request is required.

[Respond to the Request](#)

3a

3. From your **Action Center**, locate the **“You have a third-party access request pending”** action item.
 - a. Click the **“Respond to the Request”** hyperlink.

4

Third Party Access Approval

BUSINESS TEST
00000-91110

▶
▶▶▶

Third Party Access Approval
Review and Submit

Third Party Access Approval

Username
TEST3

Web Profile Name
TEST TEST

E-mail
[REDACTED]

Account Type
Sales & Use Tax ▼

Account ID
350-000055010

Approve Third Party Access

No
Yes

Make sure you allow third party access for this request to process successfully. Go to **Manage Third Party Access** to change your settings.

Access Type

File Returns and Make Payments ▼

Cancel

4c

< Previous
Next >

4. On the **Third-Party Access Approval** page, you will see the Username, Web Profile Name, and Email of the person who has requested access to your account. Additionally, you will see the Account Type for the request.
 - a. Click **No** or **Yes** to **Approve Third Party Access**.
 - b. Select the **third-party Access Type** from the drop menu. You can grant permission to **File Returns, File Returns and Make Payments, Make Payments, and View**.
 - c. Click **Next**.

5

Third Party Access Approval

BUSINESS TEST
00000-91110



This Third Party Access Approval submission is ready to submit.

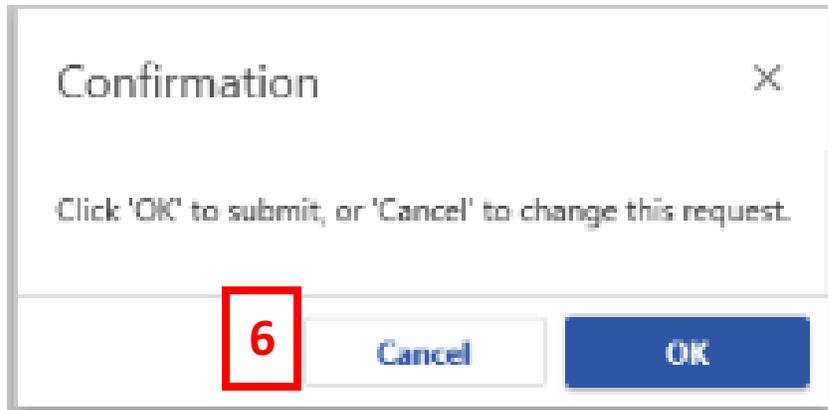
Cancel

5a

< Previous

Submit

5. **Review** your third party request.
 - a. When ready, click the **Submit** button for your request to be sent to your taxpayer for approval.



6. A **Confirmation** page will appear. Click **Ok**.

7

Confirmation

Your request has been successfully submitted. Please print a copy of this page for your records.
 Your request confirmation number is **0-000-050-738**. Please retain your confirmation number for future reference.

Request Type: Third Party Access Approval
 Submitted Date: 29-Sep-2020 1:03:03 PM

Contact Us:
 (202) 759-1946
e-services.otr@dc.gov

Printable View
OK

8

Feedback

How satisfied were you with using the MyTax application to complete your tax matter?

☆
☆
☆
☆
☆

Comments

Submit Feedback

7. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK** to be returned to the MyTax.DC.gov homepage.
8. A section to provide **Feedback** will also appear. Please take a moment to let us know how satisfied you were using the MyTax application. You will also be able to share any comments or concerns in the space provided. Once finished, click **“Submit Feedback”**.